

Today's Date: _____

Client Information Form Tax Year 2024

Which tax preparer do you prefer? Check one:

No Preference/ First Available

1) Primary Tax Payer Info			2) Spouse Info		
Full Name			Full Name		
SSN (last 4 digits for existing clients)		DOB	SSN (last 4 digits for existing client)		DOB
Mailing Address (if new client or you moved)			Mailing Address (if different from tax payer)		
City	State	Zip Code	City	State	Zip Code
Phone Number			Phone Number		
E-Mail Address			E-Mail Address		
Occupation Title (if new client or changed jobs)			Occupation Title		
Drivers License # (if new client OR expired in 2024)			Drivers License # (if new client OR expired in 2024)		
Issue Date		Expiration Date	Issue Date		Expiration Date

Marital Status - ☐ Single ☐ Married- Joint
☐ Married- Separate ☐ Head of Household

Can anyone claim you as a dependent? ☐ Yes ☐ No

FAQ: Why do I have to fill this out every year?

ANSWER: This form is part of our due diligence as tax preparers and is necessary in avoiding clerical errors and reprint fees/ amending calculations.

Direct Deposit Information for Refunds:

If your account # is the same as last year, please write the last four digits here:

Account # (if new): _____

Routing #:

Name of Bank:

Checking Account ☐ **or** **Savings Account** ☐

WHEN DROPPING OFF YOUR PAPERWORK, PLEASE HAVE YOUR TAX DOCUMENTS READY AND OUT OF THEIR ORIGINAL ENVELOPES. THANK YOU!

3) Dependents: List the names of ONLY the dependents you can claim & check the box next to their name if they are a full time college student.

Name:	Student:	Relationship: (if new dependent)	SSN: (if new dep.)	DOB: (if new dep.)
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

4) Your Income Tax Situation: Select all that apply to you or your spouse.

Do you rent your home or own your home? ☐ Rent ☐ Own

Income Sources:

- ☐ W2 Income - List # of W2 forms: _____
- ☐ Unemployment (include form 1099-G)
- ☐ Social Security Income (include form SSA-1099)
- ☐ Retirement/ Pension (include form 1099-R)
- ☐ Interest Income (include form 1099-INT)
- ☐ Dividends (include form 1099-DIV)
- ☐ Stock Sales (include form 1099-B or 8949)
- ☐ Self Employment Income/ 1099-NEC (Be sure to include a list of expenses to help decrease your Self Employment Tax)
- ☐ Rental Property
- ☐ Virtual Currency
- ☐ Gambling winnings of \$600 or more (form W2G)

Household / Dependents:

- ☐ College tuition (**must provide 1098-T form**)
- ☐ Paid student loan interest (**1098-E form**)
- ☐ Enrolled in a health insurance plan through Covered CA or the exchange market place (**must provide 1095-A & 3895 form**)
- ☐ Paid for child care/ daycare (**if you checked this box, and did not enclose a form with information, please list the amount paid, name, address, and EIN or SSN of the provider you use under the comment section**)

Miscellaneous:

- ☐ Sold or purchased a home (must provide final closing cost statement)
- ☐ Paid or received alimony prior to Jan. 1, 2020
- ☐ Purchased a brand new electric vehicle, solar panels, energy efficient windows/ doors/ water heater, battery storage technology of at least 3 kilowatt hours, and/ or insulation materials. (must provide paperwork)

We will contact you if we have any questions or suggestions regarding your income tax situation. If you would like a phone call to discuss specific matters while we are working on your return, please briefly list your questions or concerns below, as well as your phone number and the best time to call.

Phone # _____ Best Time to Call: _____

Comments, questions, or notes you have for us:

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Your Signature:

Date:

By signing, you recognize that you have thoroughly read through this form and if items were left off after your final tax return has been completed, you may be subject to a re-print fee.

Thank you for your continued business! We greatly appreciate you and hope you have a wonderful and healthy year.